University of Massachusetts Amherst

University Relations and Advancement Council

February 15, 2024

Meeting Minutes

Attendees: **P. Baillargeon (Chair), A. Duffy, S. Fitzgerald, T. Paik, O. Parkash Dhankher, J. Smith, B. Varsane**

Apologies: **J. Clark, F. Iradukunda**

1. Meeting called to order at 4:09 p.m.
2. **Arwen Duffy**, President of UMass Amherst Foundation, introduces the member of her team in attendance at the meeting and gives an update on a campaign, which is in its 6th year. Campaigns often have phases like the planning phase, the "quiet phase" (where they discuss the campaign with previous donors without public announcement), and the public announcement phase. The goal is not only to raise funds, but to also increase the fundraising capacity of the organization permanently. The team has raised about $420 million as of now. The working goal is $600 million, and they aim to decide on a final goal before the public launch, possibly even earlier than initially planned. As of now, the public launch is set for the fall, potentially during Homecoming in September. The event organizers hope for good weather to attract more attendees. The campaign update will include reaching out to past donors, prospective donors, and the alumni audience more generally.

- The team is working on various things related to the campaign launch and wants to ensure a celebration event that invites not only major donors but the entire campus and greater community, making sure everyone sees themselves as part of the campaign. Level 5, an outside vendor, is partnering with University Relations for the inauguration of the new Chancellor, providing a seamless transition between the inauguration messaging and the campaign messaging later in the fall.

- The strategic planning process is being led by Dean and Massey and Eisenberg and is based on a website called Imagining 2034. There are 6 subcommittees looking at the strategic plan. The team is focused on maintaining the integrity of the broad areas of support (teaching, research, and service to the community) and ensuring that the messaging is in concert with the strategic plan. The Provost plays a crucial role in encouraging the Deans to spend time on fundraising for their own strategic initiatives. The Chancellor's job is more external facing, focusing on the overall priorities and vision. The campaign that is being announced has already been going on for six years. The $600 million target is for the completed campaign, and the team is working on maintaining the integrity of the broad areas of support.

- The target for the new campaign is still being evaluated, as building fundraising capacity can be unpredictable. The economic conditions and their impact on donors' giving abilities also play a role in determining campaign targets. Past campaigns provide an idea of the fundraising capacity and potential for the new campaign. The advancement business has been facing a shortage of major gift officers, mainly due to an increased demand for experienced fundraisers across the industry. The pandemic led to a temporary halt in campaigns and a highly competitive job market, making staffing more difficult. The situation has improved, with a more balanced job market. The structure of the advancement business at the university is standard for R1 universities, with fund managers from different colleges working together as part of the main campaign team.

- **Bandith Varsane,** Associate Vice President, Marketing and Communications, UMass Amherst Foundation, gives an overview of the communication strategy of the campaign. The advancement operations at the university have a dispersed staffing model, with fundraisers working closely with the specific schools, colleges, and units to ensure effective fundraising. The university's advancement team is working to get back to their pre-pandemic staffing levels, with a focus on hiring people with knowledge and experience in fundraising. The team is developing donor-centric messaging by translating university initiatives and goals in a way that is impactful and meaningful for donor audiences, focusing on the impact of philanthropy. The messaging development process takes into account the leadership transition from one university leader to another, ensuring the messaging remains aligned with the university's mission and values. The team works closely with the communications team and focuses on staying true to the university's mission, vision, and values while adapting their messaging to align with changes in leadership and the messaging of the university.

- The leadership transition at the university has seen some changes in leadership style and approach, while maintaining continuity in priorities and values. The university's advancement team works closely with the Chancellor to develop messaging that reflects the university's mission and goals, as well as the values and priorities of the current Chancellor. The team focuses on adapting their messaging and approach to align with the university's evolving needs and goals, to ensure effective communication with donors. The team has been working on finding ways to make scholarships for incoming students more attractive for donors, focusing on the funding gap that exists for students. The team is exploring different strategies and ideas to help address the financial needs of students, including expanding the focus on student scholarships.

- The university's advancement team works closely with the university relations team and other departments and units to ensure consistent messaging and branding across all aspects of the university. The team focuses on developing and maintaining strong relationships with alumni and donors, ensuring that their concerns and feedback are taken into account in their work. The team is aware of and sensitive to the impact of external factors and events on the university and the higher education sector as a whole and strives to ensure that the university remains true to its mission and values in the face of these challenges. The university's advancement operation works closely with the foundation and other university entities to ensure effective communication and collaboration across all areas of the university. The team is focused on developing and implementing strategies and initiatives that support and advance the university's mission, vision, and goals, and that help to maintain the integrity and effectiveness of the university's fundraising and development efforts.

- Meeting adjourned at 5:07 p.m.